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WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

WR 29-80

WASHINGTON, Dec. 3--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following recent developments in world agriculture and trade:

GRAIN AND FEED

CANADA released on Nov. 28 the latest 1980/81 production estimates of wheat and coarse grains, based on reports as of Nov. 1. Wheat production again was revised upward to 19.1 million tons, compared with the previous estimate of 18.6 million tons and last year's drought-reduced crop of 17.1 million tons. Total coarse grain production was estimated at 21.7 million tons, virtually unchanged from the previous estimate, but up 3 million tons from last year's crop of 18.6 million, primarily reflecting a 3-million-ton increase in this year's barley crop.

The European Community (EC) raised its quota in October for exports of soft wheat to Eastern Europe (excluding the USSR) to 1.5 million tons from the previous 1-million-ton level due to increased demand. The quota, which is set according to market supply and demand considerations, was originally placed at 500,000 tons when the new tender season opened at the beginning of July. As of Nov. 20, subsidies had been awarded on 1.13 million tons. This quantity, combined with the sale of 1.1 million tons of wheat to Eastern Europe authorized under the tender opened subsequent to the partial suspension of grain sales to the Soviet Union, brings EC sales to date to roughly 2.23 million tons in calendar 1980. This compares with calendar 1979 sales to Eastern Europe of approximately 760,000

OILSEEDS AND PRODUCTS

Fish meal production for six selected major producer-exporter countries during January-July declined 10 percent, or 124,500 tons, from the same seven months of 1979, according to information compiled by the Fish Meal Exporters Organization. During the same months, fish meal exports from these countries declined 13 percent or 123,700 tons. The aggregate decline in the fish meal exports is equal to the protein fraction of about 9 million bushels of soybeans. Combined fish meal stocks in the major producer-exporter countries on July 31 were estimated at 426,700 tons, compared with 516,700 tons a year earlier.

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MARY FRANCES CHUGG, Editor. Tel: (202) 447-3370, 447-2381. Weather and Crop Summary prepared by the Joint Agricultural Weather Facility of USDA and NOAA. Tel: (202) 447-8760, 447-7917. Additional copies may be obtained from the FAS Information Services Staff, Room 5918-South, Washington, D.C. 20005. Tel: 447-7937.

Production, exports, and residual for the six selected countries are as follows in 1,000 tons, with the same period for 1979 for comparison.

Country	January-July 1979			January-July 1980		
	Production	Exports	Residual	Production	Exports	Residual
Chile	254.5	153.4	101.1	273.6	235.9	37.7
Peru ^{1/}	362.7	410.8	-48.1	217.2	192.1	25.1
Iceland	118.4	113.6	4.8	95.0	101.2	-6.2
Norway	186.8	182.2	4.6	181.2	164.1	17.1
South Africa	159.2	4.2	155.0	145.9	8.7	137.2
Denmark	162.6	141.4	21.2	206.8	170.9	35.9
Total	1,244.2	1,005.6	238.6	1,119.7	872.9	246.8

^{1/} Excludes production data for private sector.

DAIRY, LIVESTOCK AND POULTRY

Recent SOVIET data show that livestock numbers on state and collective farms continued at high levels during October. On Nov. 1, both cattle and poultry numbers (90 million and 655.5 million, respectively) were at record levels for that date, while hogs equaled the record of 57.7 million head set in 1978. Compared with last year's performance, beef production on state and collective farms during October declined by 4.1 percent, while poultry meat increased by 3.6 percent. Pork production in October was unchanged from the level achieved a year earlier.

During January-October 1980, total meat production on state and collective farms was 3.2 percent lower than the same period last year. Beef production was down by 4.2 percent, pork production declined by 5.1 percent and poultry increased by 7.2 percent.

ARGENTINA reduced its export tax on Oct. 28 for salt-cured hides from 20 to 10 percent to comply with the U.S.-Argentine bilateral hide agreement implemented on Oct. 1, 1979. At the same time, the base export price for salted hides was raised from \$23 to \$25 per piece, apparently to reflect higher international prices. Also a 10-percent export subsidy was established for Argentine exporters of semi-finished and finished leather.

Total Argentine salt-cured hide exports for 1980 (Oct.-Sept.) totaled 1,156,957 pieces. This is about 8 percent of the total slaughter, estimated at 14.4 million head.

HORTICULTURAL AND TROPICAL PRODUCTS

In the NETHERLANDS and the UNITED KINGDOM, cocoa bean grindings thus far in 1980 have exceeded last year's level.

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The Netherlands cocoa bean grindings for January-October 1980 totaled 109,700 tons, 2.6 percent greater than the corresponding period in 1979. It appears likely that the total 1980 grind will exceed the annual 1979 level of 127,460 tons.

In the United Kingdom (UK), cocoa bean grindings for January-September 1980 totaled 47,100 tons, compared with 45,900 tons for the same nine months of 1979. The annual grind in 1979 was 60,600 tons. Grind data for the second quarter of 1980 were revised to 16,100 tons, from 15,800 tons reported earlier.

NIGERIA has announced an increase in producer prices for cocoa beans, according to trade sources, to 1,300 naira per ton (about US\$1.02 per lb.) from 1,200 naira (49 U.S. cents per lb). The Nigerian cocoa-producer price remains the highest among major West African producing countries.

IN ARGENTINA, fruit production prospects for the 1980/81 season have been sharply reduced by below average temperatures and severe frosts in several provinces during the week of Nov. 8. Trade sources anticipate losses in Mendoza will range from 50 to 60 percent for stone fruit and as high as 60 to 70 percent for grapes. Last season, Mendoza accounted for 37 and 68 percent, respectively, of the total Argentine output of these commodities.

In the Rio Negro Valley, a 15 to 20 percent loss currently is projected for Granny Smith apples. This variety normally accounts for 25 percent of total apple output in the province.

The EUROPEAN COMMUNITY has recently stopped issuing import licenses for canned mushrooms from Macao and China.

The Macao action was taken due to a surge in applications to the EC. The China suspension was established in order to allow time for the EC to verify the level of recent imports from that country.

In SPAIN, the Farm Commodity and Price Stabilization Agency (FORPPA) reportedly agreed to grant a subsidy equivalent to 6 U.S. cents per kilogram on Ohanes or Almeria table grape exports. The government reportedly set aside an estimated \$2.6 million for this program.

INDONESIA plans to increase cocoa bean production through the expansion of smallholder area under cultivation at the rate of 3,500 hectares annually. The production goal is to increase output five-fold from the current level of 7,000 tons.

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NEW RELEASE OF FOREIGN AGRICULTURE CIRCULAR

World Oilseeds Situation and Outlook FOP 23-80

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INTERNATIONAL WEATHER AND CROP SUMMARY, Nov. 24-30

EUROPE--Temperatures dropped back to near normal in most countries, curtailing winter grain development in central and northern portions of the region. Average temperatures for the week tended slightly below normal in the west and slightly above in the east. Only in Romania and Bulgaria did much warmer than normal conditions persist. Accompanying drier weather in these two countries permitted late harvesting of maize. Wetter weather returned to many areas, with the greatest precipitation occurring in western Yugoslavia late in the week. Other wet areas included much of Italy, Austria, and Hungary, but only in Hungary were conditions detrimentally wet, with maize harvesting reportedly still in progress.

WESTERN USSR--Warm weather crept a little further north, allowing some renewed winter grain growth in the southern half of the belt. Greatest departures above normal occurred in the North Caucasus. Late-sown winter grains in this area benefited from the extended warmth, which should allow them to become more winterhardy. Most of European USSR received above-normal precipitation. The moisture fell as rain in the south, but renewed the snow cover in the northwest and increased snowdepths in the northeast. The snow in the northwest gave much needed protection to poorly developed winter grains.

SOUTH ASIA--Rainfall continued in coastal areas of extreme southern India, a normal pattern for this season. Some winter grain areas in northern India received beneficial rainfall early in the week, raising totals for the month above normal. Unirrigated fields benefited very much from the moisture. At the end of the week, a second westerly weather system was brushing the northern parts of the area.

NORTHWESTERN AFRICA--Crop areas in northern Tunisia and northeastern Algeria benefited from above-normal rainfall late in the week as a storm developed in the Mediterranean. Winter grains in these areas should be in good condition. Moroccan crop areas received only light rainfall for a second consecutive week, but soil moisture remains in good supply for winter grains. Only in western Algeria are conditions still too dry.

EASTERN ASIA--Above-normal rainfall spread to cover a substantial portion of southern China. Harvesting of the late rice crop should have already been completed, but some of the crop may still have been exposed to the moisture. The rains brushed southern portions of the winter grain belt, benefiting recently sown crops. Most of the belt received no precipitation, but soil moisture remained adequate for crop needs. Temperatures stayed above normal, promoting winter grain growth in all areas south of the Yellow River.

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SOUTH AFRICA--Widespread showers produced above normal rainfall over much of the Maize Triangle. Weekly totals in the Orange Free State ranged from 40 mm in southern portions to 75 to 85 mm in western and northern portions. The moisture improved conditions for sowing and germination of maize, especially in southern and western portions, which had not yet received significant rainfall. The maize crop should be planted by mid-December in most all areas to provide sufficient time for its growth cycle. In the Transvaal, weekly rainfall averaged 50 mm, and soil moisture supplies are adequate at the present time. Additional moisture will be necessary to support crop development during the warm summer months.

SOUTH AMERICA--Weekly rainfall averaged 25 to 50 mm in most of the maize and soybean-producing areas of Brazil and Argentina. A frontal system moved through the region during the latter half of the week producing heavy showers in some crop areas of Brazil. After a late start due to lack of adequate rain, soybean planting is nearly completed in Brazil's northern crop area. Showers improved soil moisture conditions in portions of northern Parana, which had been somewhat dry. The rain-delayed wheat harvest and continued wet weather has slowed planting progress in Rio Grande do Sul, where abundant moisture has fallen over the past several weeks. Argentina's wheat harvest is underway with favorable harvest weather in southern Buenos Aires and La Pampa. Shower activity may have delayed the wheat harvest in northern Buenos Aires and Santa Fe, but the additional moisture benefited the newly-sown maize and soybeans.

AUSTRALIA--Dry weather in most Australian wheat areas provided favorable conditions for the harvest, which should now be concentrated primarily in southern portions of the wheat belt. In southeastern Queensland, a few showers produced 10 to 20 mm of rain. This moisture should benefit sorghum and other spring-planted crops as the demand for moisture increases during vegetative growth. Dry weather prevailed along the coastal region of Queensland, where the harvest season for sugarcane is in its final phase.

MEXICO--Warm, sunny weather over the west coast kept tomatoes and other winter vegetables progressing well. Unseasonable coolness of the past few weeks is helping color citrus fruit in the northeast. Mostly dry conditions favored corn harvesting in the Southern Plateau, while heavy rains slowed harvest of minor crops from the Bay of Campeche coastal plains into the southern Yucatan Peninsula.

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Rotterdam Prices and E.C. Import Levies:

Asking prices in U.S. dollars for imported grain, soybeans, and tapioca, c.i.f., Rotterdam, the Netherlands, compared with a week earlier and a year ago:

Item	Dec. 2, 1980	Change from previous week	A year ago
	\$ per m. ton	¢ per bu.	\$ per m. ton
Wheat			
Canadian No. 1 CWRS-12.5%.....	1/	1/	209.50
U.S. No. 2 DNS/NS: 14%.....	245.00	6.67	205.00
U.S. No. 2 DHW/HW: 13.5%.....	240.00	6.53	208.00
U.S. No. 2 S.R.W.....	229.00	6.23	201.00
U.S. No. 3 H.A.D.....	315.00	8.57	252.00
Canadian No. 1 A: Durum.....	1/	1/	1/
Feed grains:			
U.S. No. 3 Yellow Corn.....	185.50	4.71	142.00
U.S. No. 2 Sorghum 2/.....	197.00	5.00	144.50
Feed barley 3/.....	1/	1/	1/
Thailand Tapioca.....	166.05	--	+0.68 5/
Soybeans:			
U.S. No. 2 Yellow.....	363.75	9.90	277.50
Argentine 4/.....	1/	1/	1/
U.S. 44% Soybean Meal (M.T.)..	323.00	--	-2.00 5/
EC Import Levies			
Wheat 6/.....	72.00	1.96	-8
Barley.....	43.25	0.94	-6
Corn.....	83.30	2.12	-5
Sorghum.....	64.85	1.65	-2

1/ Not available.

2/ Optional delivery: U.S. or Argentine Granifero Sorghum.

3/ Optional delivery: U.S. or Canadian Feed Barley.

4/ Optional delivery: Brazil yellow.

5/ Dollars per metric ton.

6/ Durum has a special levy.

Note: Basis January delivery.

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